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FALL & WINTER SELLING GUIDE

Also: The Basics of Retailing: Part 3

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In part three of our series on retailing's three basics—products, consumers, and employees—we look at consumers. Today, consumers cut the market into segments. And those segments are getting smaller and smaller.

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MARKET LINE

Selling The Traditional Market: Programs and Changes

What we call today the "traditional aftermarket" (warehouse distributors selling to jobbers who in turn sell to installers) is really the new kid on the block. The national system of warehouse distributors fell in place during the late 1940s and early 1950s with the formation of the Automotive Warehouse Distributors Association (AWDA), Kansas City, MO, in 1947.

Automotive suppliers soon saw the advantage of a system of regional warehouse distributors performing storage, distribution, and sales functions for the supplier. Today, the so-called traditional channel accounts for almost half of all parts sales, about $19.4 billion in 1989, according to Lindsey-Kaufman, an automotive consulting firm in Tenafly, NJ.

Changes In The Traditional Market

The traditional market has undergone significant changes since the 1950s, and because of the importance of the traditional market in selling parts, suppliers have been forced to keep pace. One major change has been on-going consolidation, the result of which is fewer and bigger buyers. The latest count by the Automotive Service Industry Association (ASIA), Chicago, finds 700 WD owners running 1,200 warehouses and 13,760 jobber store owners operating 26,200 stores.

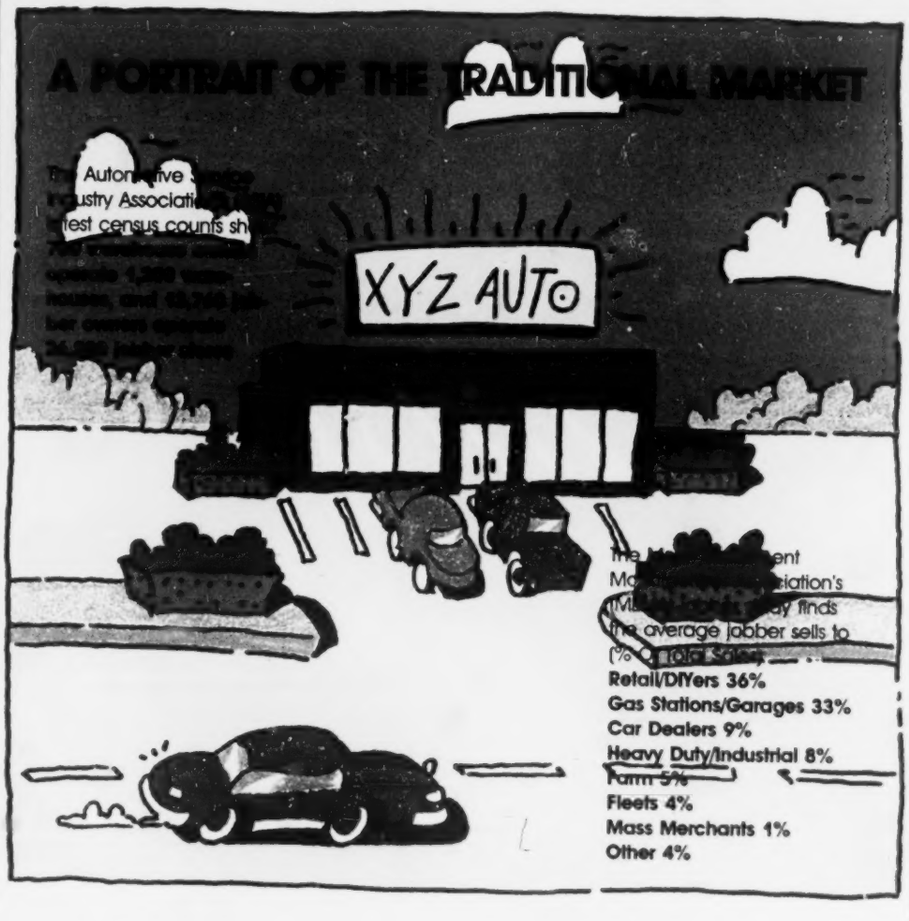
For suppliers, probably the single most important change in the traditional market in recent years is the slow death of the "blue sheet." The blue sheet is the basis for traditional market pricing; it sets the supplier's price to the jobber. In return for providing various regional functions such as storage, distribution, service and selling for a supplier, warehouse distributors buy goods at roughly 25-35% less than blue sheet price. Thus, an item listed at $1.50 blue sheet price sells to the WD for around $1. For his part, the jobber sells to various classes of customers at various prices (set by a rainbow tablet of price sheets: pink, green, yellow, etc.) above blue sheet price.

Not so long ago, the entire traditional market worked almost exclusively from the price sheets. Customers at all levels were rigidly classified as to what color sheet they could buy from although WDs and jobbers occasionally gave additional 5-10% discounts to their best customers. Suppliers also gave 2-5% volume discounts at spring and fall promotions.

But that's all changed. Although suppliers still supply blue and other color sheets, virtually no one pays the listed price. Larry Anton, president of Larry Anton Associates, Fort Worth, TX, who, in addition to consulting to the automotive industry, manages the U.S. Performance program group in Fort Worth, said, "The blue sheet is as fictitious as list price."

Programmed Distribution

The blue sheet is dead because of the growth of programmed distribution. But although there's no doubt that programmed distribution serves a good portion of the traditional market, it is difficult to find out just how many WDs and jobbers belong to programmed groups. For example, by checking two guides to programmed distribution that appeared



in jobber trade magazines, we found that 18 groups claimed a membership of roughly 1,000 WDs and 25,000 jobbers. That would mean that every WD and virtually every jobber belongs to some programmed group.

One executive, John Evans, director of sales and marketing at Champion Labs, Albion, IL, spoke for many suppliers when he said, "I'd be hard pressed to name any major warehouse that's not affiliated in some way with a group."

However, CR Industries, Elgin, IL, a manufacturer of automotive seals and bearings which is now called CR Services, conducted a survey of automotive distribution in 1989 and found that only 35% of WDs buy the majority of their inventory through buying groups. So we think that the numbers given above are an exaggeration of the number of WDs and jobbers seriously involved in programmed distribution.

SUCCESS FACTORS FOR WDS

A study by CR Services for CR Industries, Elgin, IL, ranked key success factors for WDs in the 1990s. Here are the top three factors:

1. Product availability (depth and range)
2. Reliable customer service (frequency and speedy delivery)
3. Price

Source: CR Services

WDS & SUPPLIERS IN THE 1990s

A study by CR Services for CR Industries, Elgin, IL, predicts that by 1995:

1. The number of WDs will decline by 18%
2. The number of suppliers will decline by 10%
3. The percentage of WDs buying the majority of their goods through programmed distribution will reach 60%

Source: CR Services

The Heart Of The Issue

"The heart of the issue is that all groups are not the same," Anton said. "The real proliferation of groups began about 1982-84, and manufacturers are still scrambling to deal with that phenomenon. At first, they tried a divide and conquer philosophy, and continue relationships with individual WDs. That worked in some cases. But ultimately, manufacturers were afraid not to play along with the groups for fear of losing business. So many began to offer longer deals and better terms in expectation of new business," Anton said.

"But now's there's a day of reckoning," Anton continued. "manufacturers have given up points for no new business. Too many groups were only there for the best deal. Now the manufacturers are going to demand performance in return for further concessions and a contractual agreement such as is customary in retail and mass markets. So it's those groups that can take distribution into the next phase and can demonstrate that they can do something for the manufacturer that will take it into the next phase."

The expansion of programmed groups has annoyed suppliers. Of the 18 programmed distributors listed in two jobber trade magazines, nine opened in the 1980s. "The largest and best known groups have the best WDs," Champion Labs' Evans said.

"But some groups perform no services, no functions. It doesn't matter if you're a small WD or a big jobber, if you have their phone number, you can be a member. And the well-established groups get more support from their WDs. There's nothing more frustrating than a group that says its has 50 WDs signed up so you go in and put together a private label pro-

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MARKET LINE

gram for them and they're not able to commit. The WDs are just there to see if there're better programs available than the one they have," Evans said.

Other suppliers were not as kind. Many saw the newer groups as simply issuing "hunting licenses" for better deals. However, the CR survey notes that by 1995, about 60% of warehouses are expected to do the majority of their buying through groups. "It is clear," the CR survey reported, "that program groups are expected to be the wave of the future in the aftermarket distribution pipeline with program groups approximating the strength of manufacturers."

Working Together

Greg Stout, CR Service's vice president of sales and marketing for the vehicle aftermarket said, "It's no secret that the market's consolidating. People that existed at the margin are finding it more difficult today. There's an oligarchy forming up of groups and strong players within groups. Part of the trick for suppliers involves understanding the business and working with them.

"Some of it involves discounts and better pricing, but it begs the question of value-added services and understanding. You need to create a shared vision of the future to work together and succeed. For a long time, suppliers and WDs have had an adversarial relationship. That's got to go. There's not enough profit left in the market for inefficiencies and mistakes."

One value-added service that's becoming standard in the traditional market is better inventory management by both suppliers and WDs. According to Anton, the average WD's inventory has grown from about 65,000 SKUs in 1984 to 90,000 in 1989. And, of this inventory, only a few numbers are fast movers.

Speaking at a Motor Equipment Manufacturers Association (MEMA), Englewood Cliffs, NJ, seminar in 1988, Dan Sussen, owner of Sussen Inc. stores, Cleveland, noted that he stocked 98,651 SKUs. But 8,410 SKUs accounted for 80% of sales.

Evans said it was simply a matter of a "smarter buyer. He's more aware of the true costs of inventory. He has more information so reps can't play games with him. The computer has it right there."

Just-In-Time Supply

Is there pressure on the supplier? "Sure," said CR Service's Stout. "Logistics are very important. We replenish accounts on a short term regular basis. The key is predictability. We'll set up a lead time. They'll build inventory and safety stock based on that. And we better hit the date or else."

Stout suggested one of the major value-added services suppliers could offer was information. "We've got to be smarter about what we sell. Conduct on-going surveys of field data, reports by part number and customer. Now, that's giving the WD information. Look at the market, look at the target jobbers, retailers, wholesalers, amount of imports, four-wheelers, and say, what can we sell?"

"There's a lot of pressure to supply the product just-in-time," Marty Zwolan, administrator of warehouse sales, AC-Delco, Detroit, noted. "We deliver more frequently. Computer ordering fosters that. The supplier does the inventory management. That's the essence of our battery program: weekly deliveries to jobbers and installers on behalf of the WD."

In Torrance, CA, Dan Lieberman at NGK Spark Plugs, said it's a real challenge since some NGK inventory must

HOW JOBBERS WILL ORDER FROM WDS IN THE 1990s

A study by CR Services for CR Industries, Elgin, IL, predicts that computer/FAX ordering from jobbers to WDs will increase from 22% of all orders now to 56% in 1995.

Order Entry Method	% Total Orders Now	%Total Orders 1995
Phone	49%	25%
Computer/FAX	22%	56%
Outside Salespeople	14%	6%
Telemarketing	7%	6%
Customer Walk-In	7%	6%
Mail	1%	1%

Source: CR Services

WHAT WDS WANT FROM THEIR SUPPLIERS

A study by CR Services for CR Industries, Elgin, IL, looked at what WDs want from their suppliers. Here are the top five services WDs will want from their suppliers in the 1990s.

1. Shorter lead times. Panelists predicted the number of days between order placement and receipt of products would shrink from 12 days to 8.
2. Fill rates in the 95-97% range.
3. The willingness to accept returns. Returns will increase from 13% to 14%.
4. Dated/flexible pricing.
5. More direct shipments.

Source: CR Services

come from Japan. "The onus is on us to provide the proper fill. You have to be in the 90-95% range and we aim for 95-97%. But how do you tell a customer's habits in some cases six months from now? It's hard to do with some of our facilities offshore. With 90 days you know you need X amounts. But what if the order changes? The next order is already behind."

And at Wix, which services the largest programs with filters, merchandise manager Bob Goldston said, "NAPA, Big A, Carquest, they all have automatic ordering for new items. So if you come out with a new number, you better have it ready."

And what is the biggest complaint among suppliers about their WDs? "By and large, WD sales people are a lazy lot," one supplier said off the record. "If you want sales increases, you make it happen. Our salespeople are out at jobbers writing orders for the WD all the time. It's become a necessary evil. If our people worked for the WD, the WD would owe them a lot of money. What would happen if manufacturers didn't provide this service? We provide the supply and now we're expected to create the demand." ■

How To Be A Retail Wholesaler

By Edward L. Kaufman, Contributing Editor

Today, many WDs and jobbers are convinced that technological and demographic changes will mean slower growth for the retail side of the business. So, they are re-dedicating themselves to their traditional wholesale business. These jobbers have not turned their backs on the retail customer, but they are devoting more effort to building their wholesale business. This includes making slower moving parts available and paying attention to training programs.

This leaves open the question of whether auto parts *retailers* should make an effort to make more sales to professional installers. The whole topic many simply be a case of watching the aftermarket pendulum moving in the opposite direction.

A Bit Of History

In the 1970s, parts jobbers used to talk about walk-in customers and how to get more of them. "Walk-in" is the name they applied to a civilian—a DIYer. Jobbers were in business to sell to professional installers—the gas stations, garages and car dealers' service departments of the world. These customers expect broad coverage, prompt availability, knowledgeable countermen, credit and delivery service.

But, if a non-professional came in and paid cash—well, why should any jobber be hostile to money on the counter? After a while, jobbers saw that that the retail customer was much more profitable. DIYers would pay higher prices and mark-ups, no credit and no services; just cash and carry.

Starting about 1974, thousands of gas stations and car dealers closed up, leaving a smaller base of wholesale customers for jobbers. At that point, jobbers decided to aggressively go after retail business and became, in the process, jobber/retailers.

Now, the pendulum is swinging in the opposite direction. As we said, jobbers are re-dedicating themselves to wholesale business. So, what about retailers?

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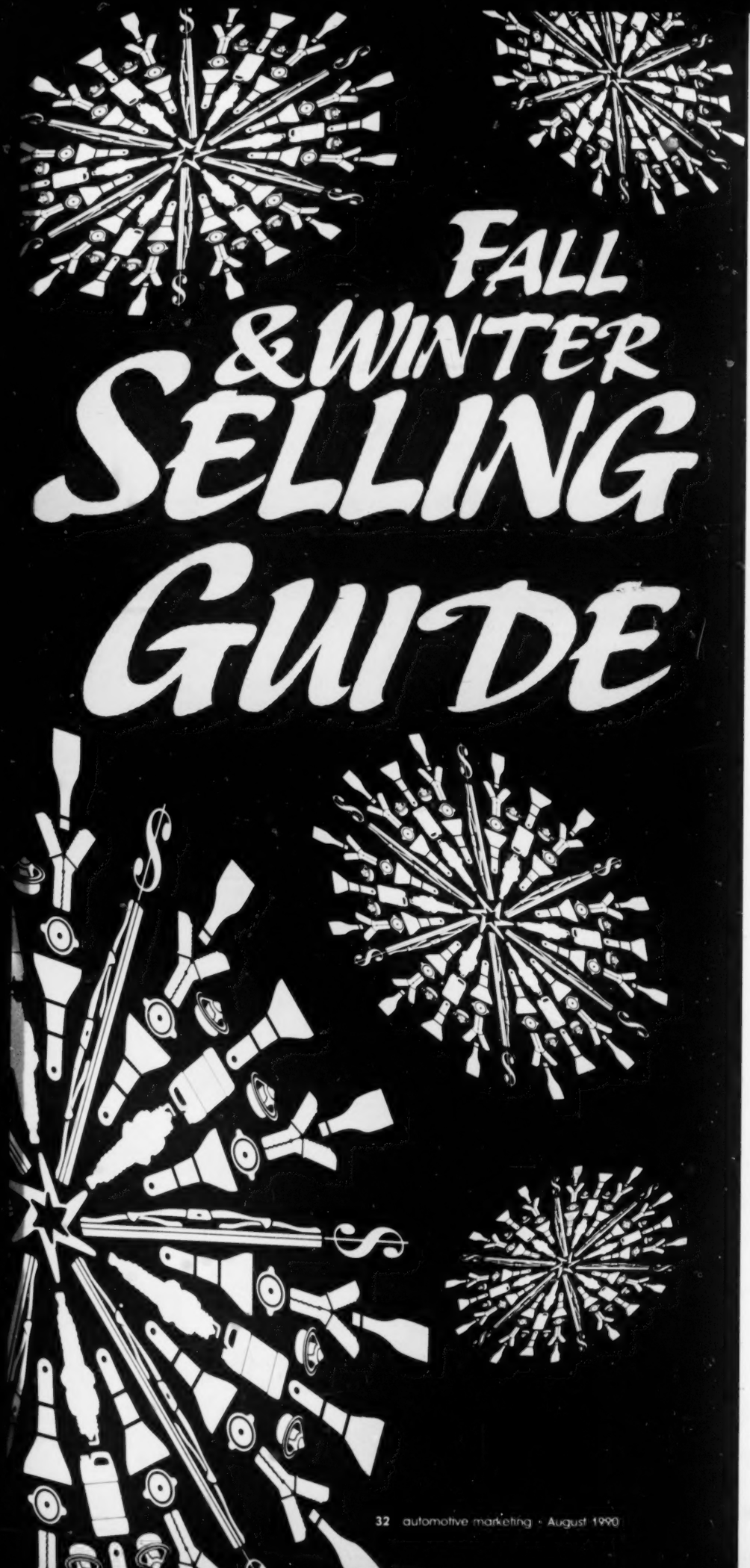


FALL & WINTER SELLING GUIDE

Despite all the good signs, some retailers aren't wholly optimistic about the rest of 1990.

by **Phil Katcher,** Business Editor, & **Gail Krueger-Nicholson,** Managing Editor

All signs point to the rest of the year being good, if not actually great, for the retail aftermarket.

After all, government figures indicate that producer prices rose 0.3% in May for the first rise in three months of decline. According to the Mortgage Bankers Association of America, late mortgage payments are at their lowest level in a decade, an indication of the fact that the public seems to have money available.

You would, therefore, expect this good news to spill over into the retail aftermarket. And, for many retailers, it has. "We are having a decent increase in sales," reports Johnny Saulmor, J&N Auto Parts, Thornton, IN. But all is not optimistic as some retailers see signs of a minor recession and other grapple with the question of whether there is really a distinct fall/winter selling season anymore.

Wet Weather Helps

Last year retailers generally were singing the blues about past mild, dry winters that cut sales of cold weather-related products. They wanted colder temperatures. In the first months of last winter, their prayers were answered, but as the winter dragged on, snow turned into rain.

Nevertheless, this was still a blessing. Midwestern retailers whose sales had been seriously damaged by the previous three dry years welcomed the rain. Before it began falling, farmers's disaster relief claims were running at the rate of $150 million a month.

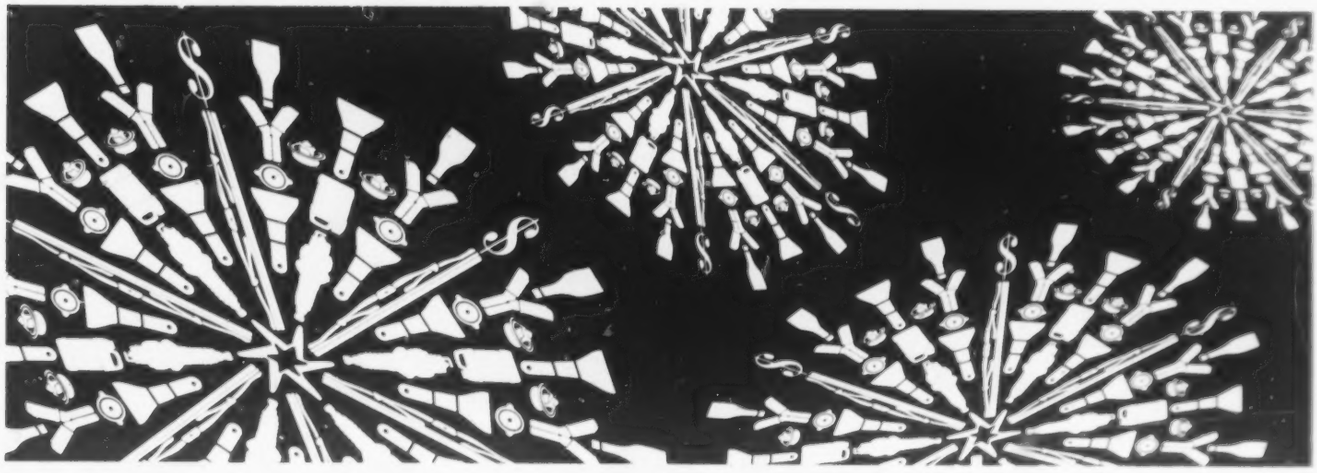
"With taxes going up and no rain," Ray Downing, Ray's Auto Supply, Seneca, KS, told *Automotive Marketing* last winter, "the farmers aren't going to be able to afford the things that need to be done on their cars."

Now, however, the first steady rainfall in the Midwest in several years has helped much of the aftermarket. "Business is up 15% over last year," said Downing when *Automotive Marketing* revisited him. "Wet weather helps. Maybe the farmers will raise a crop this year and have more money to spend."

Or does wet weather help? Perhaps not everywhere. In some areas, such as Illinois, there are reports that wet weather has delayed planting and damaged crops already in the ground. Said Norm Meinke, 2-M Auto Supply, Lowell, AR, "It has been so wet here that it is hard to determine what will come next."

Looking For Bad News

But, even with the good news about the



economy and weather, people seem to be looking over their shoulders, watching for the bad times they just seem to expect after a steady decade of prosperity.

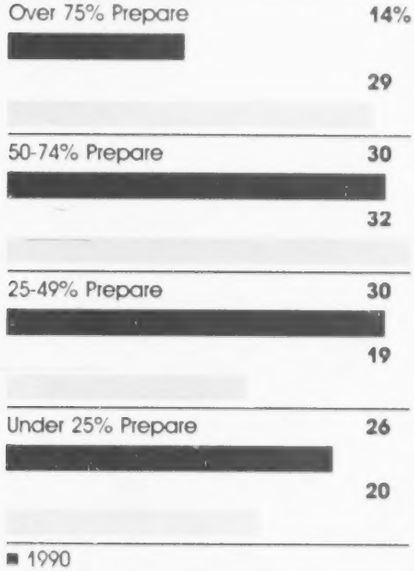
According to the Department of Commerce, the country's Gross National Product (GNP) for the first quarter grew only 1.9%, the second slowest growth rate in three and a half years. At the same time, DOC announced, the inflation rate was 6.4%. Meanwhile, retail sales declined three months in a row, ending in May with a 0.7% decline for that month. And, the Conference Board's index of consumer confidence was 106.7 in May, down ten points from a year earlier. So, while the early 1990 economic indicators were mixed at best, they didn't indicate a tremendous growth spurt.

And, many aftermarket retailers already see this slow growth rate. Said Thomas Ingram, Ingram Auto Parts Inc., Winston-Salem, NC, "Business is going to be a slow growth." This is an improvement, however, for his area of the country. A year ago, he said, sales were running some 5% behind the year before that.

Slow, or even negative, growth isn't limited to any one area of the country, such as the oil-producing areas, as with

HOW MANY DIYERS PREPARE THEIR VEHICLES FOR WINTER

We asked retailers what percentage of their customers actually prepared their vehicles in some way for winter weather in 1985 and this year. On the whole, retailers don't believe that vehicle maintainers are any better prepared than they were five years ago – possibly even less so.



Source: 1985 & 1990 *Automotive Marketing* Retail Panels

ANTIFREEZE & WINTER CHEMICALS

Over the past two winters, retailers have seen antifreeze/coolant go from an easy to a not-so-easy sale due to rising prices. When the cost of the main antifreeze ingredient, ethelene glycol, jumped so did retail prices. And antifreeze sales took a tailspin. Nevertheless, retailers are a bit more optimistic about potential antifreeze sales this fall/winter selling season than last.

Richard D. Dudley, Northstar Auto Supply Inc., Dansville, NY, reasoned that sales of antifreeze will be better because customers have postponed flushing their radiators due to previous high prices. This year, they really need to do so, he said.

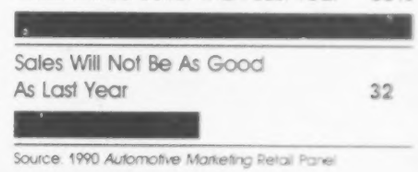
Art Badgley, Art's Precision Automotive, Godfrey, IL, said sales will not be as good because people will still fail to change their antifreeze. But, he added, that leads to more sales of replacement cooling system parts.

Antifreeze sales are still price sensitive. Gene Krupa, Dick's Automotive Co., St. Michael, PA, said, "Price will have a lot to do with sales. Discounters make this sale hard for me to get." He added that rebates from manufacturers help a little.

Winter chemicals, on the other hand, are seen as strong sellers. J. L Van Ryckeghem, Western Auto, San Pedro, CA, said "Due to better awareness of the importance of the proper use of winter chemicals, I believe customers will buy more of these products."

ANTIFREEZE/COOLANT & CHEMICALS SALES

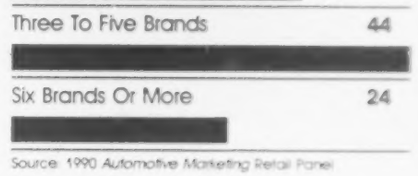
We asked our Retail Panel members if they expected sales of antifreeze/coolant and chemicals to be better this fall/winter selling season than last year or not as good.



Source: 1990 *Automotive Marketing* Retail Panel

ANTIFREEZE/COOLANT & CHEMICALS BRANDS

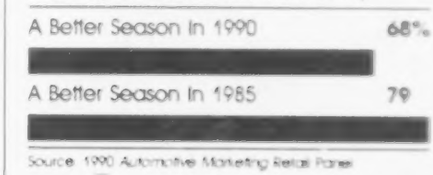
We asked our Retail Panel members how many brands of antifreeze/coolant and chemicals they carry.



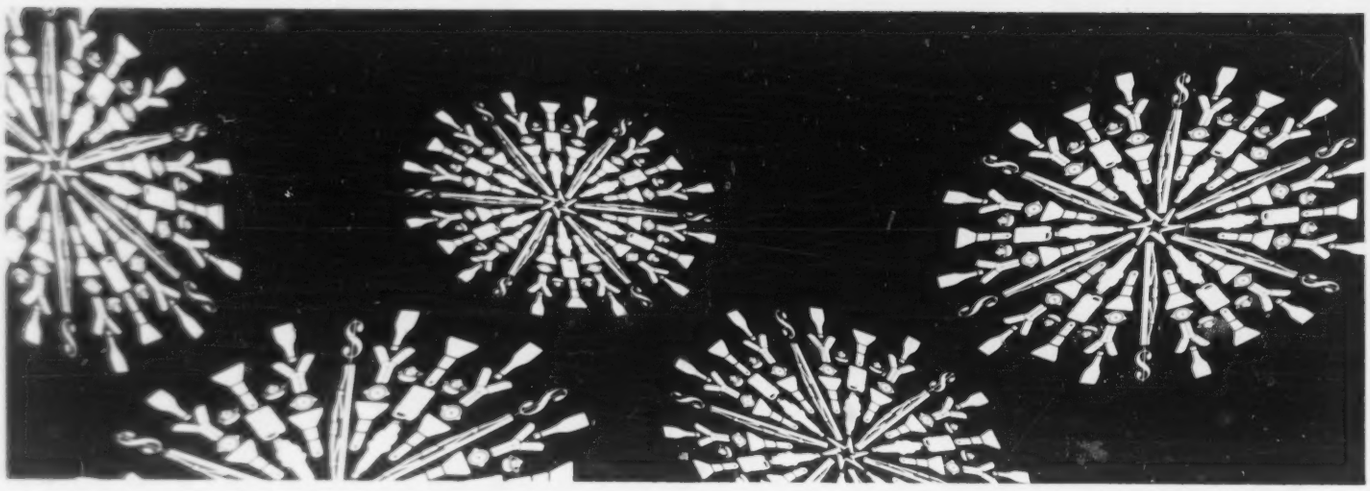
Source: 1990 *Automotive Marketing* Retail Panel

WHAT DOES THE FUTURE HOLD?

We asked retailers whether they expected a better fall/winter selling season than the previous year both in 1985 and again this year. Retailers were more optimistic in 1985 than today.



Source: 1990 *Automotive Marketing* Retail Panel



previous slow-downs. In Texas, for example, David Carter, Ken's Auto Parts, Mesquite, isn't happy about the first half's sales results. When asked about the rest of the year, he said, "I hope it gets better than it has been."

On the East Coast, a survey issued in June by National Westminister Bancorp, New York, of top CEOs of mid-sized companies predicted hard economic times in the near future in New England and the New York/New Jersey/Connecticut areas.

And, in the South, said Lewis Edwards, owner of a Western Auto Auto Associate store in Pahokee, FL, "I believe the government is not aware that a hopefully minor recession started a year ago."

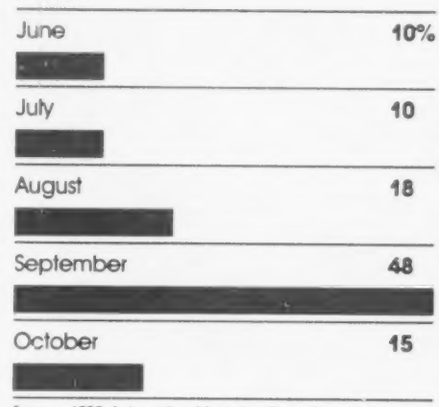
Prediction By Product Lines

Nevertheless, in general, retailers report that the aging auto population and favorable weather conditions give them some confidence in sales for the upcoming fall/winter selling season. Many retailers noted that when it comes to specific product lines—cooling systems parts were mentioned most often—increased vehicle age means more replacement sales. Also, many of the members of our Retail Panel added that their DIY customers are no longer intimidated about working with relatively new technology such as fuel injection. "We think that these parts have been around long enough that they will need replacement and people are not afraid to replace them. This means more sales," 2-M's Meinke said about fuel injection parts.

When it comes to other traditional fall/winter products lines, Retail Panel members have mixed feelings. The jump in antifreeze/coolant prices over the past year has made some retailers gun-shy about the sales potential of this product

WHEN RETAILERS BUY

We asked retailers by month they'd finished making their fall/winter buying decisions. Most will be done by next month.



Source: 1990 *Automotive Marketing* Retail Panel

BATTERIES & BATTERY CHARGERS

Saying battery and battery charger sales depend on the weather is as obvious as saying the sky is blue. But, according to manufacturers, it is still just as true.

"Battery sales are like merchandising 101," one manufacturer told us. "Display them, advertise them, and if the weather cooperates they will sell."

Retailers agree. But they add that the age of the vehicles in their market area and how they promote these products also impact battery and charger sales.

Jerry Rebele, Sav-On Auto Parts, Little Neck, NY, said, "Batteries in our area sell well due to extreme climate fluctuations and should do even better this year as cars become older." He said he will use window signs to promote batteries and chargers.

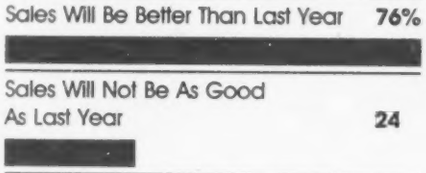
W. H. Crook, Graves Auto & Home Stores Inc., Pine Bluff, AR, added, "Sales of these products should be good because of the number of older vehicles on our roads." He will use sales tabloids, direct mail, and radio to promote batteries and chargers. He also said he wants to see more national advertising from the manufacturers.

Ray E. Downing, Ray's Auto Supply Co., Senecca, KS, said "Sales depend on how well they are promoted and how severe the weather is." Downing said he uses in-store signs to promote batteries and chargers.

No matter what promotion they use, retailers still agree weather is the biggest factor in selling batteries and chargers. Fred Holzum, Sears, Cape Girardeau, MO, reported, "I don't believe the sales will be as good as last year. We sold $16,000 worth of batteries in three days due to extreme weather. That will be hard to beat."

BATTERIES & BATTERY CHARGER SALES

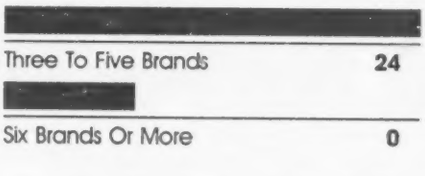
We asked our Retail Panel members if they expected sales of batteries and battery chargers to be better this fall/winter selling season than last year, or not as good.



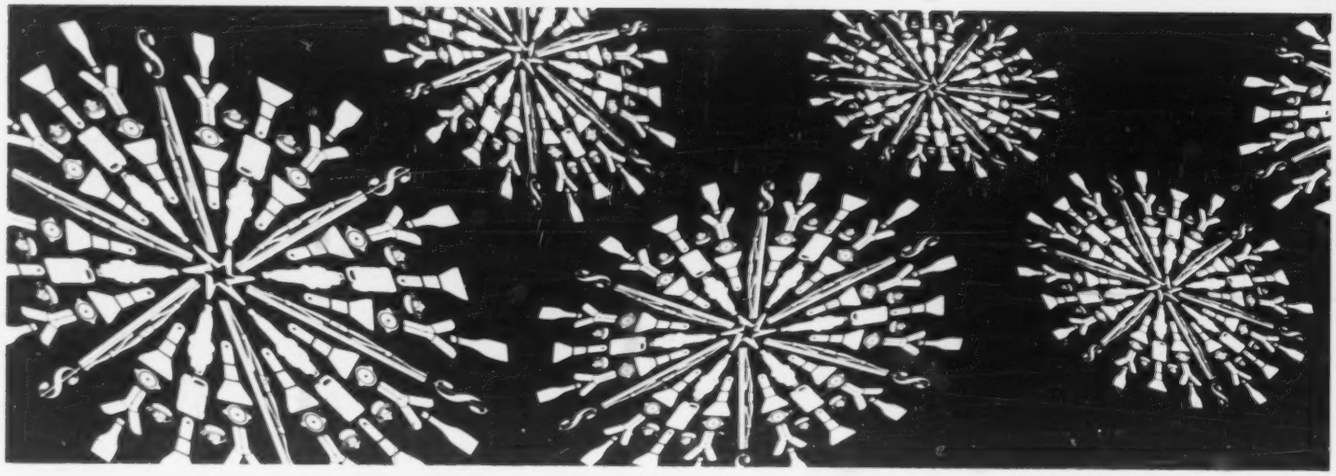
Source: 1990 *Automotive Marketing* Retail Panel

BATTERIES & BATTERY CHARGER BRANDS

We asked our Retail Panel members how many brands of batteries and battery chargers they carry.

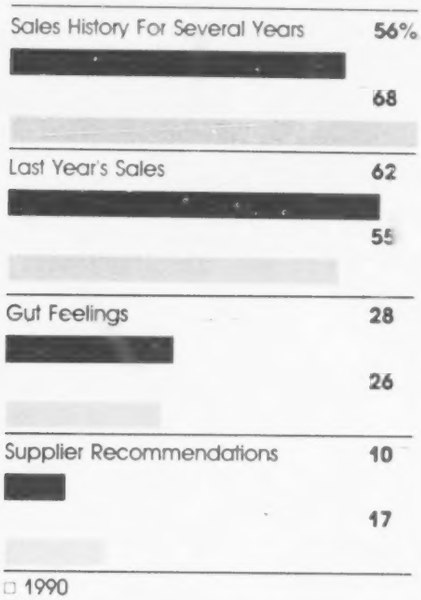


Source: 1990 *Automotive Marketing* Retail Panel



HOW RETAILERS BUY

We asked retailers what factors were most important in determining how much they will buy in fall/winter products in 1985 and again this year. Buying patterns seem little different today than in 1985.



Source: 1985 & 1990 *Automotive Marketing* Retail Panels

category. However, as Richard Dudley, Northstar Auto Supply, Dansville, NY, put it, "Customers have postponed cleaning radiators because of high antifreeze prices. And now, they're overdue to do it." Most of our Retail Panel members said they believed sales of other winter chemicals will be stronger, however.

As always, the retailers see the sales of batteries and battery chargers as being very weather dependent. Fred Holzum, Sears, Cape Girardeau, MO, said, "I don't believe the sales will be as good as last year. We sold $16,000 worth of batteries in three days due to extreme weather. That will be tough to beat."

The bright spot for many retailers this fall/winter selling season will be wiper blades and blade accessories. Almost all of the Retail Panel member said they expected sales of these products to be strong. (For more comments on specific product lines, see the sidebars with this story.)

We asked our Retail Panel members how they intended to promote traditional fall/winter products and what manufacturers could do to help them improve sales. Newspaper inserts and radio spots continue to be the favorite way of promoting seasonal products for most Retail Panel members. However, many of them said they would increase their use of in-store point-of-sale materials.

For the most part, our Retail Panel members were satisfied with the promotional efforts of the manufacturers for the fall/winter selling season. However, some of them asked for more technical information on cooling system parts and fuel injection parts.

Making Other Predictions

While some retailers are optimistic, others have just given up trying to predict upcoming season sales.

For example, asks one, is there a distinct fall/winter selling season? Not according to Art Badgley, Art's Precision Automotive, Godfrey, IL. "If the four

COOLING SYSTEM PARTS

Cooling system parts—heater cores, control valves, fittings, blower motors, belts and hoses, and other items—are favorites of retailers this fall/winter selling season because of their replacement potential. Cooling system parts makers are also predicting strong sales this fall/winter season. And one manufacturers told us his company plans to offer an extensive program of retail sales training on cooling system parts.

As with other seasonal products, retailers say weather and the age of vehicles in any given market area are key factors to selling cooling system parts.

Ray E. Downing, Ray's Auto Supply Co., Senecca, KS, said sales of cooling system parts are very dependent on the weather. And he added that manufacturers need to provide more data on the use of their products.

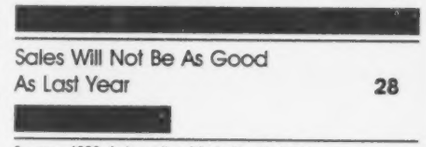
Frank Johnson, Lacey Automotive Parts Co., Soledad, CA, said "I will sell more hoses and belts because of heat problems on newer cars."

Jim Foley, Foley's Auto Parts, Alden, NY, said sales will be better because people are not buying new cars and the older cars need these replacement parts.

J. L Van Ryckeghem, Western Auto, San Pedro, CA, agrees. He said "With more cars on the road and higher new car prices, the five year old and older car is ready for these replacement parts."

COOLING SYSTEM PARTS SALES

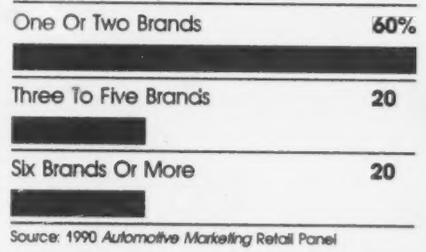
We asked our Retail Panel members if they expected sales of cooling system parts to be better this fall/winter selling season than last year, or not as good.



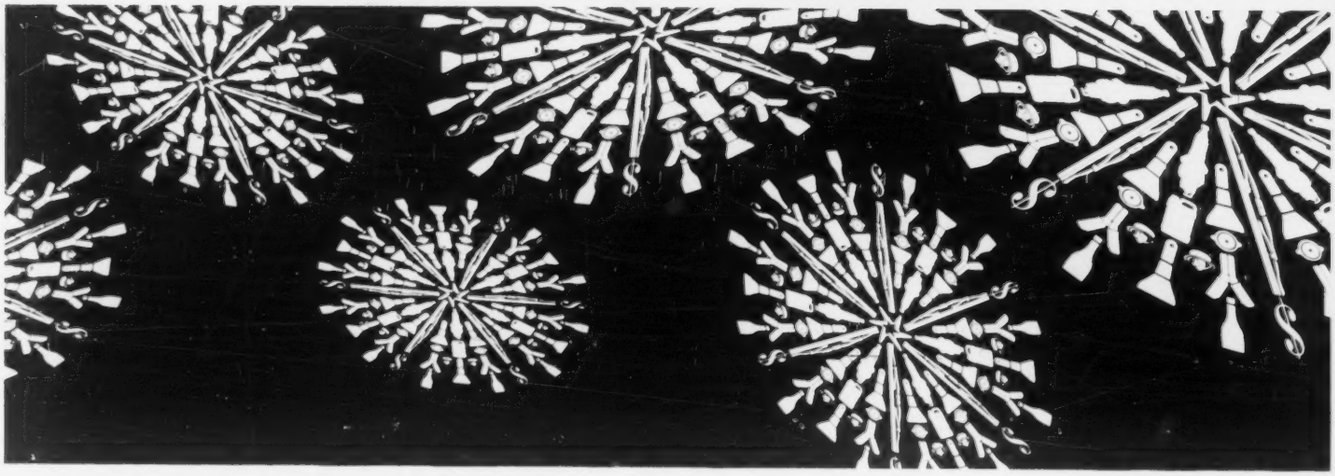
Source: 1990 *Automotive Marketing* Retail Panel

COOLING SYSTEM PARTS BRANDS

We asked our Retail Panel members how many brands of cooling system parts they carry.



Source: 1990 *Automotive Marketing* Retail Panel



seasons were clearly defined again," he said. "I could stock for the correct season. I sell sun tan lotion in December and antifreeze in May. It's crazy." A year ago Badgley told us that he thought the economy was on a down-trend.

At the end, says Tom Hendricks, Champion Auto Stores, Forest Lake, MN, sums up the problem most aftermarket retailers admit to. "I hope," he says, "the rest of the year's more predictable than the first half." ■

IGNITION & FUEL INJECTION PARTS

Fuel injection parts are no longer a mystery for retailers or consumers. And that is good news for this fall/winter selling season. Jerry Rebele, Sav-On Auto Parts, Little Neck, NY, said, "Sales of these are already up due to the number of F.I. cars introduced in my market." He will use window signs to promote fuel injection parts and thinks the manufactures should advertise more often.

J. L Van Ryckeghem, Western Auto, San Pedro, CA, agreed. He said, "Every year in recent past, sales of these products have increased and the future looks promising."

W. H. Crook, Graves Auto & Home Stores Inc., Pine Bluff, AR, added, "Sales should be good as our auto owners are keeping their autos longer and doing more maintenance on them." He wants makers to offer rebates on fuel injection parts.

IGNITION SYSTEM & FUEL INJECTION PARTS SALES

We asked our Retail Panel members if they expected sales of ignition system and fuel injections parts to be better this fall/winter selling season than last year, or not as good.

Sales Will Be Better Than Last Year	84%
Sales Will Not Be As Good As Last Year	16

Source: 1990 *Automotive Marketing* Retail Panel

Frank Johnson, Lacey Automotive Parts Co., Soledad, CA, said he will use more POS displays to let his customers know he carries fuel injection parts.

Despite the optimism, both Johnson and L. S. Wilson, C.W. Douglas Inc., Buzzards Bay, MA, believe manufacturers need to provide more training material on fuel injection parts for retailers and consumers. Johnson wants clinics from manufacturers to update his information. And Wilson said, "This market is changing and we need technical training from the manufacturers of these products."

IGNITION SYSTEM & FUEL INJECTION PARTS BRANDS

We asked our Retail Panel members how many brands of ignition system and fuel injection parts they carry.

One Or Two Brands	64%
Three To Five Brands	20
Six Brands Or More	16

Source: 1990 *Automotive Marketing* Retail Panel

WIPER BLADES & BLADE ACCESSORIES

Winter ~~wiper blades~~—the blades made of extra heavy materials encased in rubber boots—gain popularity each year, according to the manufacturers. The blades are designed to help drivers fight the snow and ice build-up that is common with ordinary blades. And the consumers like the idea. Total winter blade sales for the industry were at seven million units in 1989, up from 5.9 million units in 1987, according to one maker.

Between the increased sales of winter blades and the increased accessorizing options offered by colored blades in milder weather, retailers are enthusiastic about the product category overall. Besides, Gene Krupa, Dick's Automotive Co., St. Michael, PA , added "Sales will be up because people replace them more often. Manufacturers' advertising has helped here a lot."

WIPER BLADES & BLADE ACCESSORIES SALES

We asked our Retail Panel members if they expected sales of wiper blades and blade accessories to be better this fall/winter selling season than last year, or not as good.

Sales Will Be Better Than Last Year	76%
Sales Will Not Be As Good As Last Year	24

Source: 1990 *Automotive Marketing* Retail Panel

WIPER BLADES & BLADE ACCESSORIES BRANDS

We asked our Retail Panel members how many brands of wiper blades and blade accessories they carry.

One Or Two Brands	84%
Three To Five Brands	16
Six Brands Or More	0

Source: 1990 *Automotive Marketing* Retail Panel